UC Santa Barbara   Policy 7020
Policies
Issuing Unit: Administrative Services   Date: June 1, 1985

                          FORMS MANAGEMENT

I.   REFERENCES:

     A.UCSB Policies Manual, Policy 7000, Access and Release of
          Information.

     B.UCSB Policies Manual, Policy 7050, University's Records Management
          Program.

     C.University of California Business and Finance Bulletin, RM-3,
          Forms Management Guidelines.

II. POLICY:

     For the purposes of this policy, a form is any piece of paper
     containing printed information, produced or reproduced by whatever
     means,with blank spaces left for the entry of additional data or
     information.

     A.   Responsibility:

          Any form which will be used by more than one UCSB department, or
          any departmental form used to collect personal information should
          be submitted to the Information Practices/Records Management
          Coordinator in Business Services for review prior to
          reproduction. This review is necessary to insure that the
          necessary privacy notification statements are included. The
          Information Practices/Records Management Coordinator will
          advise on forms design and ordering procedures. In addition,
          the Information Practices/Records Management Coordinator will
          coordinate (and serve as the liaison for) the review and
          ordering of Systemwide forms generated by the Office of the
          President.

     B.   Forms Design:

          The following basic information must be preprinted on campus
          department and interdepartmental forms:

          1.   Title of form

          2.   University of California, Santa Barbara identification

          3.   Departmental identification

          4.   Approved University records retention period for the form;
               see Records Disposition Schedules Manual. (If disposition
               schedule is to be determined, the Information Practices
               Coordinator/Records Management Coordinator will submit the
               necessary information to the Office of the President, in
               accordance with UCSB Policy 7050.)

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5.    Form Number, if any

6.    Instructions for completing the form

7.    Distribution instructions, if multi-part form

8.    Printing date (or revision date) and the quantity printed

9.    Applicable Privacy notification, in accordance with Policy
      7000
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Please direct questions about these policies to Meta.Clow@vcadmin.ucsb.edu. For questions or comments regarding the format of the above information, please contact webcontact@ucsbuxa.ucsb.edu.

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